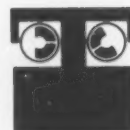


TRAVEL PRINTOUT

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1984 OUTLOOK FORUM FEATURES RECREATION, ATTRACTIONS AND ACCOMMODATIONS FORECASTS

The American Recreation Coalition chairman and a senior executive of Pannell Kerr Forster will moderate panels forecasting performances of the hospitality, foodservice, recreation and attractions industries during the U.S. Travel Data Center's 1984 Travel Outlook Forum, December 12-13 in metropolitan Washington, D.C.

"Market Opportunities in the Recovering Economy," theme of the ninth annual premier conference on travel and tourism prospects, takes place in the Crystal Gateway Marriott Hotel.

Albert Gomes, a principal at Pannell Kerr Forster will lead the outlook session on accommodations and foodservice and is an expert on long-range strategy, investment analysis, feasibility, and facility planning in the hospitality industry.

Other panel members are:

- John Rohs, vice president-research, Wertheim and Company, an institutional banking and research firm, presenting the outlook for hotel and motel lodging;
- Susan Mills, director of research National Restaurant Association, who will present the outlook for foodservice; and
- Robert Dickinson, vice president-sales and marketing, Carnival Cruise Lines, presenting the outlook for cruise travel.

American Recreation Coalition Chairman David Humphreys is also president and general counsel of the Recreation Vehicle Industry Association and a spokesman for the recreation industry. He is on the U.S. Congressional Travel and Tourism Advisory Board and an executive committee member of the Travel and Tourism Government Affairs Council.

Humphreys will be head of the recreation and attractions panel, which includes:

- Don Ryan, president-camping group, Kampgrounds of America, who will present the outlook for camping in 1984;
- Dale Robertson, assistant chief, U.S. Forest Service, presenting the outlook for national forest visitation; and
- Don McMullen, vice president-research, Taft Broadcasting Co., who will present the outlook for theme parks and private attractions.

For registration and further information, contact Ida Simmons, U.S. Travel Data Center, 1899 L Street, N.W., Suite 610, Washington, D.C. 20036. Phone: (202) 293-1040##

SPECIAL STUDY TARGETS POTENTIAL PACKAGE TOUR MARKETS

Americans take more than 50 million package tours a year, yet the market for these trips is hardly tapped, according to a report to be released next month by the U.S. Travel Data Center.

Analysis of special tabulations of the Data Center's National Travel Survey finds package tours total less than one-fifth of all trips of five nights or more away from home taken by U.S. residents. Married couples, those aged 45 to 64, retirees, and those living in the Great Lakes region offer the best opportunities for package tour expansion.

The special study, "The U.S. Market for Package Tours," will be released at the Annual Conference of the U.S. Tour Operators Association, November 30, 1983, in Hawaii. Copies will be sent to Full Members and will be available to others for \$60 prepaid, including postage.##

TRAVEL PRICES INCREASE SLIGHTLY DURING SEPTEMBER

Posting the smallest increase in six months, the cost of travel in the U.S., as measured by the U.S. Travel Data Center's Travel Price Index (TPI) rose only 0.1 percent in September 1983.

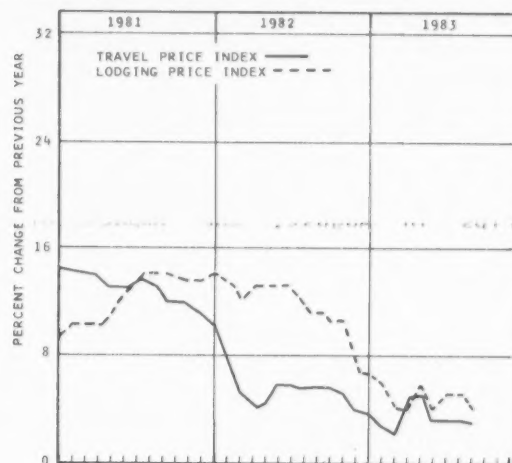
For comparison, the Consumer Price Index (CPI) rose 0.5 percent on a seasonally unadjusted basis in September, up slightly from the 0.3 percent rise during August.

The TPI, which measures changes in the seasonally unadjusted cost of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in this country, stood at 355.0 in September (1967=100).

Gasoline prices dropped 0.6 percent, and the cost of lodging out of town fell 0.3 percent, prompting the small increase in overall travel prices.

The cost of entertainment services grew 0.9 percent, leading all TPI components. The cost of incidental purchases followed, up 0.7 percent. Both airline fares and intercity bus fares increased 0.6 percent.

The TPI has increased 2.8 percent since September of last year, slightly less than the 2.9 percent increase registered by the CPI during the same period. Intercity bus fares have jumped 12.5 percent during the past year to lead all other components. On the other hand, gasoline prices are still 1.8 percent below September 1982 levels.##



LODGING PRICE INFLATION CONTINUES TO DECLINE

Monthly and Annual Rates of Change in the Travel Price Index and Components,
September, 1983

TPI Component	Monthly Percent Change	Annual Percent Change
	August, 1983 to September, 1983	September, 1982 to September, 1983
Transportation	0.0	1.3
Airline Fares	0.6	3.4
Intercity Bus Fares	0.6	12.5
Intercity Train Fares	0.1	7.8
Taxicab Fares	0.4	1.2
Gasoline	-0.6	-1.8
Lodging	-0.3	3.9
Food Away From Home	0.4	4.0
Entertainment Services	0.9	5.1
Incidentals	0.7	2.9
TRAVEL PRICE INDEX	0.1	2.8
CONSUMER PRICE INDEX	0.5	2.9

Source: U.S. Travel Data Center and U.S. Bureau of Labor Statistics

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SURVEY REPORTS TRAVEL DECLINE IN AUGUST

The U.S. Travel Data Center's National Travel Survey reported Americans took 134.6 million person-trips in August, nearly 8 percent less than one year earlier. (A person-trip is recorded each time a person goes on a trip 100 miles or more away from home.)

While travel activity for all purposes declined, pleasure travel fell only 1 percent. Vacation travel declined 6 percent, followed by business/convention travel which has been depressed in every month but one since January 1983, according to the monthly telephone survey.

Although fewer travelers took fewer trips in August, the impact of the decline was somewhat mitigated by an increase of 60 miles in the average trip's distance and average stays of 5.6 nights, over one night longer than one year ago. Weekend travel, however, fell 9 percent, suggesting that travelers are directing their resources toward longer stays at more distant destinations.

The upscale market segment continued to increase vacation travel for the third consecutive month. Persons with family incomes of at least \$30,000 annually took 10 percent more vacation person-trips than in August 1982.

Despite the overall decline, travel by air continued to increase, a trend begun in February of this year. Travel by auto/truck/RV, however, fell nearly 7 percent.

According to the survey, vacation travel plans are near the same level as one year ago. Thirty-six percent of the population intends to take a vacation trip in the next six months. Of these, 56 percent plan to use auto/truck/RV transportation and 33 percent will travel by air. Twenty-five percent plan to travel to the Mountain West/Far West regions, the preferred destination among the nine travel regions covered by the survey.

The National Travel Survey is a monthly telephone survey of over 1,400 American adults. Results are projectable to the total adult population.##

Twenty-seven percent of the U.S. adult residents planning a trip in the next six months intended to travel to a destination in The South, according to the August wave of the National Travel Survey (measuring travel activity in July), not 74 percent which was reported in October Travel Printout.##

VISITOR VOLUME AT NATIONAL PARKS

Region	August, 1983 visits ¹ (thousands)	Change from July, 1983 (percent)	Change from August, 1982 (percent)	1983/82 Year- to-date (percent)
New England	2,037.1	-19.1%	-2.2%	11.5%
Eastern Gateway	1,532.7	45.4	2.9	4.4
G. Washington Country	8,036.6	-10.7	8.3	1.6
The South	6,208.1	-10.3	6.1	7.5
Great Lakes Country	1,033.6	-9.5	9.9	13.1
Mountain West	4,118.8	-2.6	5.7	3.7
Frontier West	2,462.5	-39.8	-1.4	-0.3
Far West	6,347.0	-0.5	-5.7	-6.7
The Islands	210.1	-6.0	4.3	-2.5
TOTAL	31,986.5	-10.0%	2.8%	1.6%

¹Preliminary; adjusted for differences in reporting units.
Source: National Park Service

States comprising the travel regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. EASTERN GATEWAY: New York, New Jersey. GEORGE WASHINGTON COUNTRY: Delaware, District of Columbia, Maryland, Pennsylvania, Virginia, West Virginia. SOUTH: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee. GREAT LAKES COUNTRY: Illinois, Indiana, Iowa, Michigan, Minnesota, Ohio, Wisconsin. MOUNTAIN WEST: Colorado, Montana, Nebraska, North Dakota, South Dakota, Utah, Wyoming. FRONTIER WEST: Arizona, Kansas, Missouri, New Mexico, Oklahoma, Texas. FAR WEST: Alaska, California, Idaho, Nevada, Oregon, Washington. THE ISLANDS: American Samoa, Guam, Hawaii, Northern Marianas, Puerto Rico, Virgin Islands.

CURRENT TRAVEL INDICATORS	August, 1983	% Change from July, 1983	% Change from August, 1982	Year-to-date % Change 1983/1982
Establishment receipts or retail sales				
Hotels, motels and other lodging places ¹	\$ 2,930 million	2.5	6.0	5.9
Eating and drinking places ²	\$10,083 million	0.1	10.6	12.2
Gasoline service stations ²	\$ 8,986 million	1.3	2.8	-1.5
Commercial lodging demand				
Hotel/motel occupancy rate ³	64.4 percent	1.4	3.6	-0.7
Real demand for commercial lodging ⁴	\$ 1,081 million	1.4	1.3	0.9
Airline passenger traffic⁵				
Domestic revenue passenger-miles	17.6 billion	1.4	2.4	6.2
International revenue passenger-miles	5.8 billion	2.2	14.7	8.9
Bus passenger traffic⁶				
Intercity bus passenger-miles	3.1 billion	0.6	1.3	-1.7
Highway traffic volume⁷				
Rural arterial vehicle-miles	42.4 billion	-0.7	3.4	4.0
Rail passenger traffic⁸				
Amtrak passenger-miles	N/A	N/A	N/A	N/A
Travel Price Index⁹	354.7	0.6	3.4	3.4
U.S. resident travel¹⁰				
Total person-trips	134.6 million	8.4	-7.7	-1.4
Vacation person-trips	100.0 million	11.7	-6.1	-1.1
Public use of National Parks¹¹				
Visits	35,557,023	-13.6	0.0	-1.0
Overnight stays	3,173,684	-1.1	-5.0	-5.0
Foreign arrivals in U.S.¹²				
From overseas	N/A	N/A	N/A	N/A
From Canada	1,766,814	-3.3	22.7	13.8
U.S. citizen departures¹³				
To overseas	N/A	N/A	N/A	N/A
To Canada	1,900,254	-17.7	-14.2	-1.7
Domestic demand for motor gasoline¹⁴				
Barrels per day	6,946 thousand	2.4	5.0	0.4

¹Source: Laventhol and Horwath, seasonally unadjusted. ²Preliminary; adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. ³Source: Laventhol and Horwath, seasonally adjusted. ⁴Source: Laventhol and Horwath, unadjusted expenditures for commercial lodging adjusted for inflation since 1972. ⁵Preliminary; U.S. scheduled service air carriers. Source: Civil Aeronautics Board. ⁶All carriers regular route and charter service. Source: American Bus Association. ⁷Source: Federal Highway Administration. ⁸Source: National Railroad Passenger Corporation (Amtrak). ⁹Source: U.S. Travel Data Center and Bureau of Labor Statistics. ¹⁰Source: U.S. Travel Data Center. ¹¹Preliminary; unadjusted for differences in reporting units. Source: National Park Service. ¹²Source: U.S. Travel and Tourism Administration and Nettelton Travel Research Center. ¹³Preliminary; Source: U.S. Department of Energy.

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